R9375-1

TRAVEL PRINTOUT
U.S. Travel Data Center
Research News for the U.S. Travel Industry

JULY 1992 Volume 21, Number 6

Autumn '91 Travel Shows Signs Of Recovery

Following a downward slide in travel volume during the summer of 1991, the autumn 1991 travel figures show a rebound within the industry. According to the Data Center's newly published *1991 Autumn Travel Market Report*, the volume of travel during September through November grew substantially over the same period in 1990.

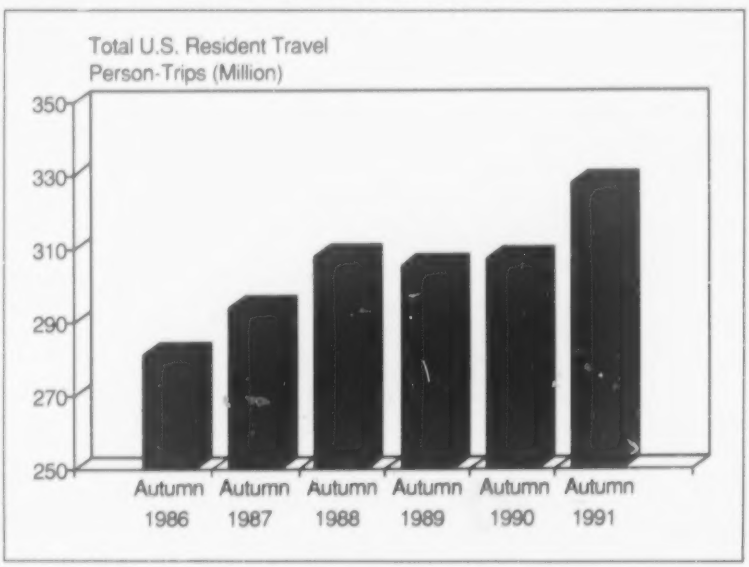
The Gulf War and the recession put a damper on summer travel in 1991, however autumn proved to be a very productive season compared to previous years. During the autumn months of 1991, overall travel rose 7 percent to just over 327 million person-trips, out-distancing autumn 1990's travel volume of 307 million person-trips.

"It appears that at least part of this growth can be attributed to the fact that some travelers postponed their summer trips until Fall," said Suzanne Cook, executive director of the U.S. Travel Data Center. "Additionally, the increase represents a rebound from the autumn of 1990 when travel was dampened by the intensifying Persian Gulf conflict."

With the exception of 1989, autumn travel in the United States has been on an upward trend since 1986.

"The Fall is an important time for travel," said Cook. "It appears more and more people like to avoid the summer vacation rush and wait until the Fall when things are much calmer and less crowded."

The Southeast region of the United States, once again, was the most popular travel destination, hosting the largest number of person-trips during Autumn 1991 (88.7 million person-trips). Travel to the Great Lakes region dropped during the autumn of 1991, while travel to the Midwest picked up slightly.



Two significant segments of the autumn 1991 travel market showed marked improvements over autumn 1990. Weekend travel jumped 19.4 percent, to 169.4 million person-trips in autumn 1990, as compared to 202.5 million last autumn.

Business travel was the other segment that experienced vast improvements compared to autumn 1990. Business and convention travel rose nearly 18 percent from 55.5 million person-trips in Autumn 1990 to 65.2 million during the same period in 1991. This recovery in business and convention travel helped offset significant declines earlier in the year. Business travelers in the autumn of 1991 also were more likely to combine work with pleasure. Fifty-one percent of the business person-trips were considered to be business/vacation trips.

The 1991 autumn travel season continued to reflect many of the same trends evident in earlier surveys. Both the amount of time travelers spent on trips and average party size took a dip compared to autumn 1990. In autumn 1991, the average duration for trips dropped to 3.5 nights. That number is down from 1991's autumn figure of 3.8 nights.

The size of 1991 autumn traveling parties declined modestly from autumn 1990. Last autumn, the average traveling party

(Continued on page 3.)

INSIDE

- May Travel Price Index Report
- Thompson Re-Joins Data Center
- Discoveries.....

Costs Decline For Second Consecutive Month

For the second consecutive month, travel prices declined in the United States. According to the Data Center's latest Travel Price Index (TPI), the 0.4 percent drop in prices in May could be attributed to the lodging industry, which dropped its prices by almost 2 percent, and a 3.2 percent decline in airline fares.

A back-to-back decrease in travel prices last occurred over a three month period last year. During the months of March, April and May of 1991, the cost of travel slid a total of 1.8 percent.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, decreased to 148 (1982-84 = 100) during May. The TPI indicates price changes in travel goods and services available to the consumer in the United States and does not necessarily represent changes in average fares, rates and other costs that travelers actually paid.

The U.S. Travel Data Center releases the Travel Price Index during the last week of each month. For more information on the Travel Price Index, contact Joseph P. Horak at (202) 293-1040.

TRAVEL PRICE INDEX AND COMPONENTS

MAY 1992	MONTHLY % CHANGE APRIL 1992 TO MAY 1992	ANNUAL % CHANGE MAY 1992 TO MAY 1991
TPI COMPONENTS		
TRANSPORTATION	0.3	0.4
Airline Fares	-3.2	2.9
Intracity Public Trans.	0.1	6.0
Other Intracity Trans.	1.1	4.9
Motor Fuel	4.6	-2.6
LODGING	-1.7	6.0
FOOD AND BEVERAGES AWAY FROM HOME	0.1	2.2
ENTERTAINMENT	0.4	3.0
TRAVEL PRICE INDEX	**-0.4**	**3.1**
CONS. PRICE INDEX	**0.1**	**3.0**

(SOURCE: U.S. TRAVEL DATA CENTER)

Thompson Named Market Research Analyst

The U.S. Travel Data Center recently announced that Patrick Thompson has been named market research analyst for the organization. It will be the second-stint at the Data Center for Thompson, who was a research assistant from 1989 to 1990.

"The Data Center is extremely pleased to have Patrick back with us," said Suzanne Cook, executive director of the Data Center. "His knowledge and experience will be a strong asset to our organization."

Thompson graduated from the College of William and Mary in 1989 with a degree in business. Following his initial employment with the Data Center, Thompson was a consultant for the accounting firm of Price Waterhouse.

In his new position, Thompson will be responsible for both the management of the National Travel Survey and client projects. He will also be involved with the day-to-day operations of the research department headed by the manager of market research Elizabeth Stewart.

Thompson replaces Kelly Repass, who has been hired by the Orlando/Orange County Convention and Visitors Bureau.

"We are excited for Kelly and her new opportunities. We look forward to working with her in her new capacity," said Stewart. "Patrick will be able to make a quick transition and do an exceptional job taking over where Kelly left off."

Currently, the market research department is putting the finishing touches on the 1991 National Travel Report. In mid-June, the 1991 Autumn Travel Market Report was released.

TRAVEL PRINTOUT is published monthly by the U. S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel and Tourism Industry Association of American

Dr. Suzanne Cook, Exec. Dir.

Joseph P. Horak, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research and trends in the travel industry. Subscriptions are $75 per year; Foreign countries, $80. ISSN: 0744-6233

Continued from page 1

size was 1.86 while in autumn 1990 it was 1.88.

Auto/truck/RV person-trips, along with air transportation, were again the most popular forms of transportation in the 1991 autumn. Travelers took 259.2 million person-trips by auto/truck/RV, which is an increase of 6.8 percent over 1990 autumn numbers of 242.7 million person-trips. Air transportation declined slightly over the previous autumn. In the autumn of 1991, 51.1 million person-trips were taken by air, a one percent drop from 1990's autumn number of 51.6 million.

In Autumn 1991, of the total 327.7 million person-trips, 74 percent were taken to visit friends or relatives, for outdoor recreation or other entertainment purposes. A high percentage of the Autumn 1991 travelers stayed in hotels and motels or with friends and relatives during their trips, 45 percent and 41 percent of all person-trips, respectively.

Demographically, the majority of autumn 1991 travelers were married (51%) and male (54%). Forty-five percent were between the ages of 25 and 44, while 47 percent worked in a professional/managerial or other white collar positions.

The *1991 Autumn Travel Market Report: Results From The National Travel Survey* may by purchased for $100 by contacting the Data Center's marketing department at (202) 293-1040. (Data Center members will be receiving a complimentary copy.)

DISCOVERIES.....

New Book Explores "The Seasons of Business"

American Demographics has recently published a comprehensive book, *The Seasons of Business: The Marketer's Guide to Consumer Behavior*, which offers insight into consumer trends and habits throughout the seasons of the year.

"Supported by a wealth of facts and figures and a comprehensive index covering activities ranging from shopping to television viewing to honeymooning to travel, a holistic view of the consumer emerges. A must for marketers and researchers seeking to better understand and compete for consumers' time and money," said Suzanne Cook, executive director of the U.S. Travel Data Center.

This publication walks the reader through each month, citing the items that are most likely to be on sale in that month and how the weather and holidays affect consumers' motivation and buying habits.

In addition to trends concerning the marketplace, the publication also explores societal trends that may affect product markets and consumers.

Data Center seasonal travel information and figures are included in the book along with facts on business travel and recommendations for the best time to travel.

This authoritative publication is available for $34.95 and may be ordered by calling American Demographics at 1-800-828-1133 or by writing to American Demographic Books, P.O. Box 68, Ithaca, NY 14851.

MORE DISCOVERIES...

USTTA Publishes 1991 In-Flight Inbound Survey

The United States Travel and Tourism Administration (USTTA) has recently released its *1991 In-Flight Survey of International Air Travelers: Overseas Travelers to the United States* (Inbound). Fifty-four participating airlines and more than 40,000 respondents make the 1991 In-Flight Survey the most comprehensive survey on overseas visitors to the United States.

The Immigration and Naturalization Service and USTTA reported more than 16 million overseas travelers to the U.S. in 1991, excluding travelers from Mexico and Canada. The 1991 In-Flight Survey can be used to determine, by overseas country of residence, the U.S. destinations they visited, how long they stayed, how much they spent, the type of accommodations they used, their purpose of trip, the activities they participated in, whether they used a pre-paid package or not, how they booked the air and lodging portions of their trip, their port of entry and more.

The 1991 Inbound In-Flight Survey is available for $200. For an additional $200, these data will also be provided in Lotus 1-2-3. This information is also available in custom banner reports which you design to focus on your destination or market of interest. To order the Inbound 1991 In-Flight Survey or for more information, please contact the Data Center's marketing department at (202) 293-1040.

In addition, the USTTA also has available the *1991 In-Flight Survey Annual Inbound Country Specific Reports*. Compiled from the In-Flight Survey, these publications provide detailed descriptions for travelers to the U.S. from Australia, Brazil, France, Italy, Japan, U.K., Venezuela, Germany and Mexico. These publications may be purchased from the Data Center for $200 each.

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	PERCENT CHANGE MONTH / YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales					
Hotels, Motels, Other Lodging (1)	APR	$5,786	millions	-1.1	2.6	5.7
Eating and Drinking Places (2)	MAY	$16,472	millions	0.1	1.9	4.8
Gasoline Service Stations (2)	MAY	$10,118	millions	-0.8	-5.6	-5.0
Consumer Lodging Demand					
Hotels/Motels Occupancy Rates (3)	APR	61.4	percent	1.3	-1.0	1.3
Real Demand For Commercial Lodging (4)	APR	67.3	millions	0.2	2.8	4.9
Airline Passenger Traffic (5)					
Domestic Revenue Passenger Miles	MAY	27.3	billions	5.7	-0.8	-1.0
Int'l Revenue Passenger Miles	MAY	10.5	billions	10.9	10.5	28.1
Highway Traffic Volume (6)					
Rural Arterial Vehicle Miles	APR	46,168	millions	2.7	6.3	5.5
Rail Passenger Traffic (7)					
Amtrak Passenger Miles	APR	547.4	millions	2.6	13.1	1.2
Travel Price Index (8)					
(1982-1984 = 100)	MAY	148		-0.4	3.1	2.2
Visitor Vol. at National Park Service Areas (11)					
Recreational Visits	APR	21.4	millions	38.4	11.0	7.8
Overnight Stays	APR	998,437		42.0	9.0	7.0
Foreign Arrivals to the United States					
From Overseas (12)	DEC (91)	1,448,595		18.8	9.0	7.3
From Canada (13)	APR	1,566,066		-7.5	2.3	6.1
From Mexico (12)	DEC (91)	158,216		58.0	9.9	7.6
U.S. Citizen Departures					
To Overseas (12)	DEC (90)	1,262,000		18.0	3.6	8.0
To Canada (13)	APR	651,231		23.8	9.7	3.4
Domestic Demand For Motor Gasoline (14)					
Barrels Per Day	APR	7,348	thousands	2.8	3.0	2.7

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted, 1986 and 1987 data has been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) U.S. Travel Data Center. (10) U.S. Travel Data Center, data is not comparable to earlier published numbers due to revised methodology. (11) National Parks Service, preliminary, unadjusted for differences in reporting units. (12) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (13) Statistics Canada. (14) U.S. Department of Energy, prelim.

TRAVEL PRINTOUT

Research News for the U.S. Travel Industry

U.S. Travel Data Center
Two Lafayette Centre
1133 21st Street, NW
Washington, DC 20036-3390
(202) 293-1040

U.S. POSTAGE
PAID
FIRST CLASS
PERMIT NO. 8523
WASHINGTON, D.C.

JULY 1992